2   CHAPTER: IRMS INTRODUCTION AND NAVIGATION

2.1 Overview of IRMS

The Department of Taxation (TAX) is responsible for administering the Virginia Set-Off Debt Collection Program, commonly called the Set-Off Program. To help accomplish this, a web-based Integrated Tax Revenue Management System (IRMS) has been developed to provide the ability for Set-Off Agencies to create, revise, and review claim and match information on-line.

2.1.1 How IRMS Organizes Information

Once you are successfully logged into the IRMS Web application, you can view information about the claims and matches submitted by your Agency including:
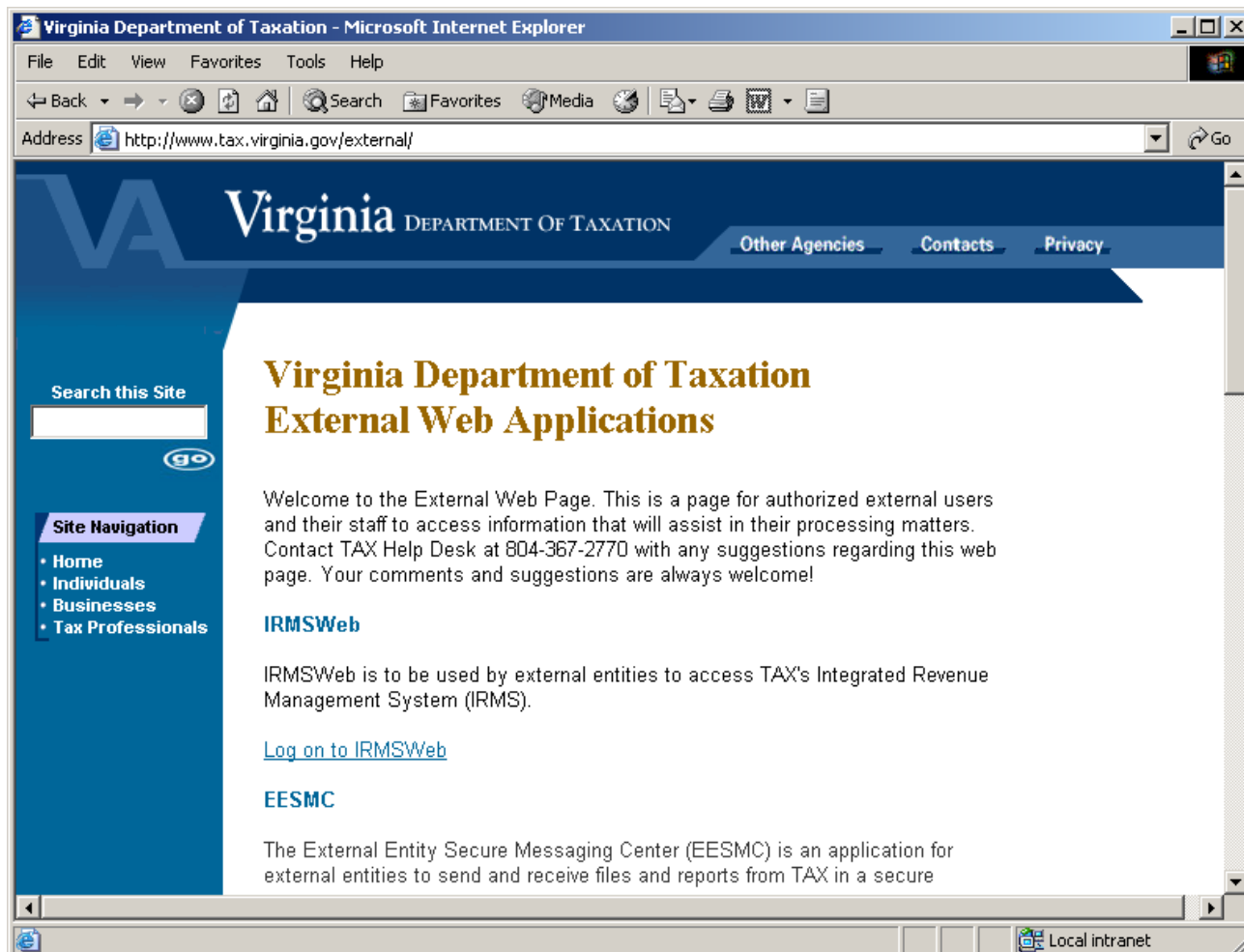
- Claim Summary, Detail, and History Information

- External Offsets in Progress Information

- External Offsets Payment Summary and Payment Detail Information.

You can also manage claim and match information including:

- Create, Modify, Delete, or Reinstate Claims

- Certify or Contest a Set-Off Match

- Finalize a Set-Off Match

- Correct a Set-Off Finalized Amount

Note: Remember, this manual is specific to on-line IRMS processes. You can also submit claim and match information using batch processes.

2.2 Getting Started

2.2.1 Starting a Session – First Login

You will access IRMS using Internet Explorer. Perform the following steps to start your session.

Step 1: Navigate to the Desktop window if you are not already there.

Step 2: **Double-click** on the Internet Explorer Icon.
The screen displays your designated Homepage. In this example, the TAX web site is the Homepage. (Remember, you may see a different screen when you launch Internet Explorer.)

Step 3: Click the **Log on to IRMSWeb** link. The IRMS Login window displays.

📝*Note:* Subsequent logins will not require a Password change, but will display the main menu window when you enter your correct User ID and Password. You will be notified before your password expires. You can change your password before it expires by clicking the **Change Password** button when you login.

🗒️ *Note:* You will have been assigned a USER ID and a temporary password. The first time you log in to IRMS, the system will force you to change your password to a permanent one.

Step 4: Enter your **User ID**.

Step 5: Enter the temporary **Password**.

🗒️ *Note:* IRMS protects the secrecy of your password by showing asterisks (*) in the Password field as you type.

Step 6: Click **OK**.
The system displays the IRMS Change Password window.

Step 7: Enter a new password in the **New Password** field. Your IRMS password must be between 8 and 16 characters in length. The first character must be a letter and the password must contain at least one number. The password is not case sensitive; therefore, you do not need to worry about entering upper and lowercase letters.

Step 8: Retype your new password in the **Verify Password** field to ensure that your password is correct.

Step 9: Click **OK** to log in.
The IRMS Confidential Message window displays reminding you that you are dealing with confidential customer information:
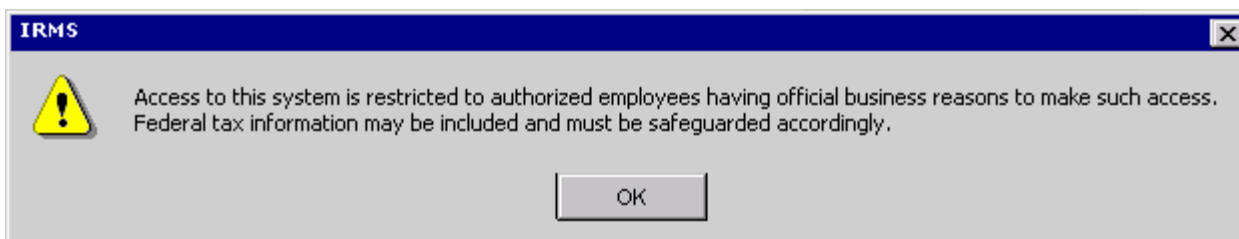
Note: If you are unable to log in after three attempts, contact your Security Administrator to reset your password.

Step 10: Click **OK**. The IRMS Main window opens.
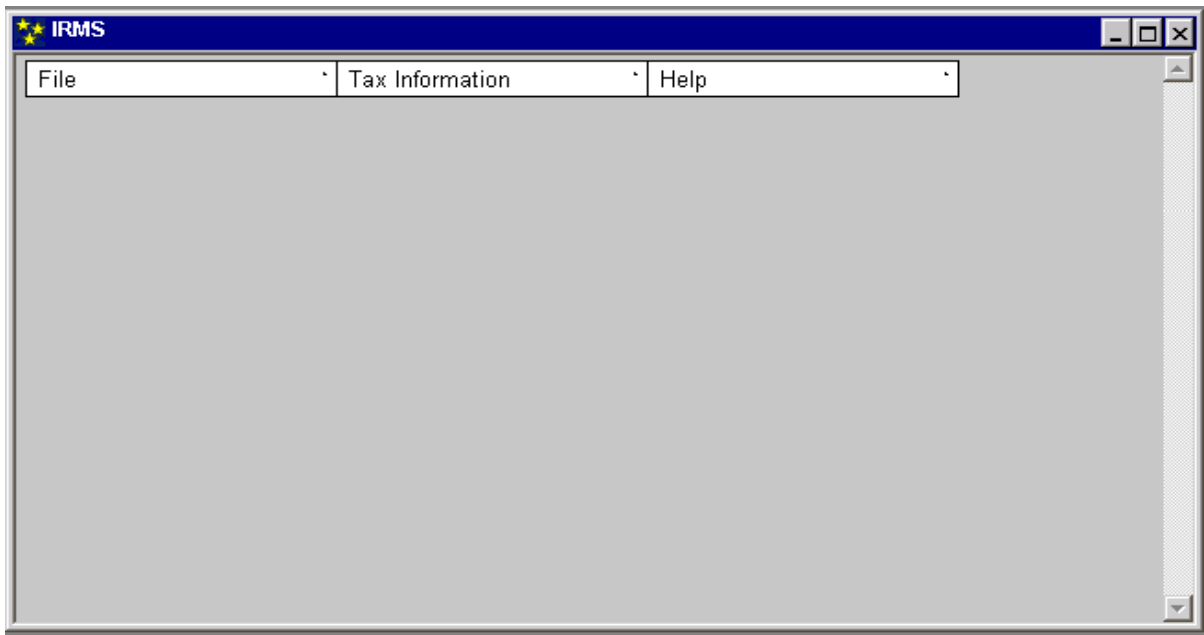
Note: Keep in mind that you need to login to the IRMS application at <u>once every 60 days</u> in order to keep your account active.

2.3 Accessing IRMS Information

2.3.1 IRMS Main Window

After you have successfully logged into IRMS, you will see the IRMS Main window. All of your work in IRMS will originate from this window.

The contents of this window include:

- **Title Bar** identifies which window you have accessed and includes the standard windows resizing buttons.

- **Menu Bar** lists the pull down menus that are used to access IRMS windows. The menus displayed on the Menu Bar may change depending on which IRMS window is active. You can display the contents of each window by clicking on the menu and choosing an item from the pull-down boxes.

- **Display Area** contains the specific window you have accessed. The illustration below is the IRMS Main window.
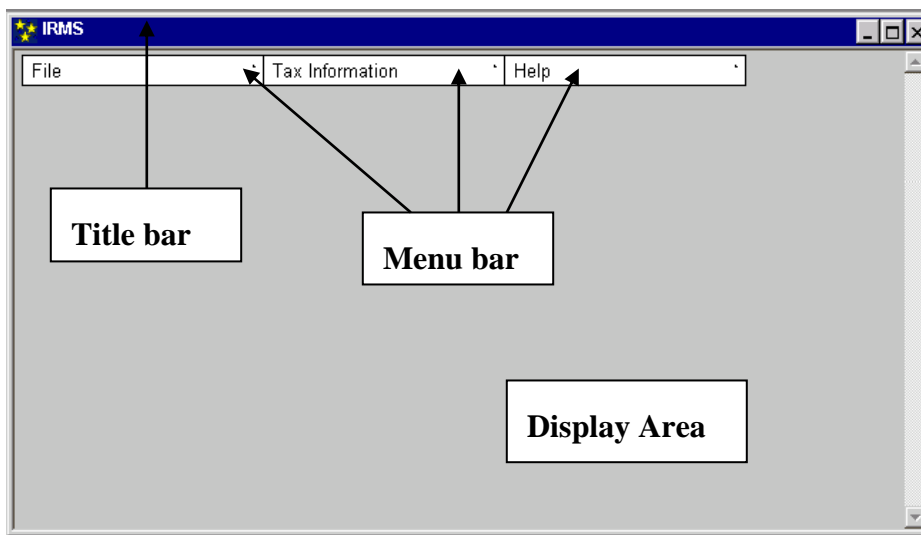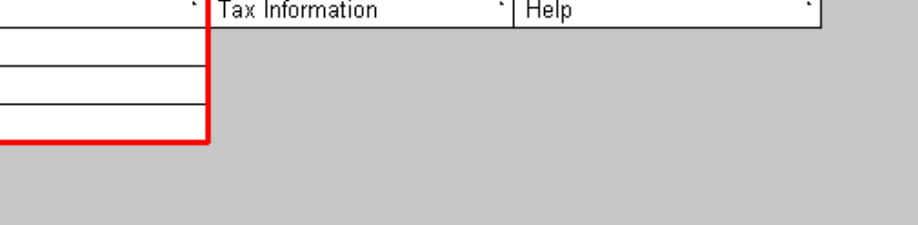
The IRMS Main Menu Bar
The Menu Bar contains three Menus: File, Tax Information, and Help. To access the information in IRMS, you must choose an activity from one of these menus.
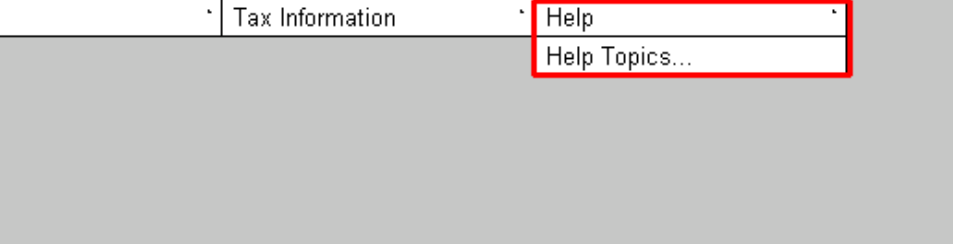
Note: Depending on your role, the menus shown in the illustration above may vary.

The illustration below is the IRMS Main window – File menu:

The File menu provides you with the ability to Print, Close the current window, and Exit IRMS.

The illustration below is the IRMS Main window – Help menu:

The Help menu provides on-line IRMS Performance Support System (PSS) help.

The illustration below is the IRMS Main window – Tax Information menu:
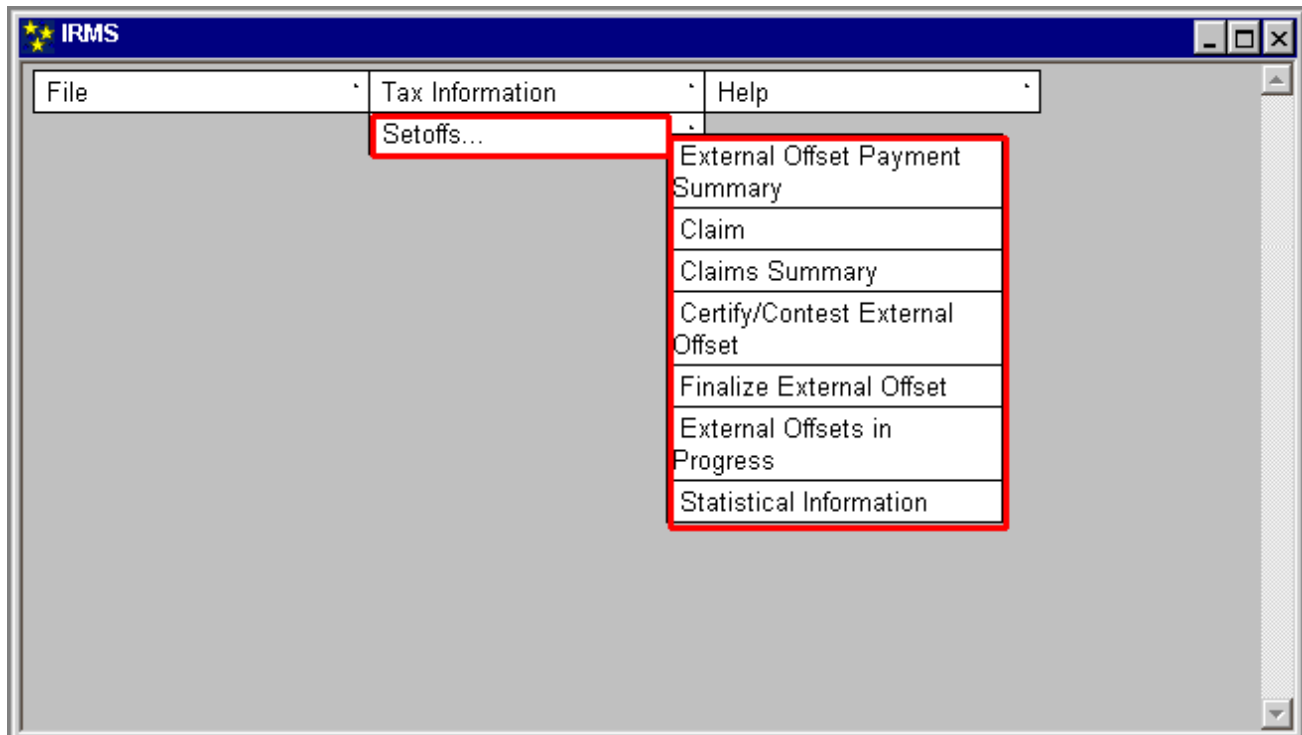
This is the menu that you will use most often to navigate in IRMS and access information.

Note: Depending on your role, you may not have all of the menu selections shown in the illustrations below.

2.3.2 IRMS Windows

After you have selected an item from one of the menus on the Main window, you will view an IRMS window displaying the information you selected.

There are several different types of windows in IRMS. The types of windows are:

- **List** - These windows display lists of items that you can select to view additional information. You highlight an item on the list to view a Detail window.

- **Detail** - These windows contain fields for you to view, enter or change information.

- **Pop-up** - These windows are intended to make you aware of the consequences of your actions. Most often, they either remind you of what you have done, or ask for a confirmation that you have done what you intended. These message boxes and error messages are discussed in the appropriate chapter(s).

The illustration below is an example of a Detail window:

The illustration below is an example of a List window:

The illustration below is an example of a Pop-up window:

2.4 Ending a Session

To end an IRMS session, you must return to the IRMS Main Window.
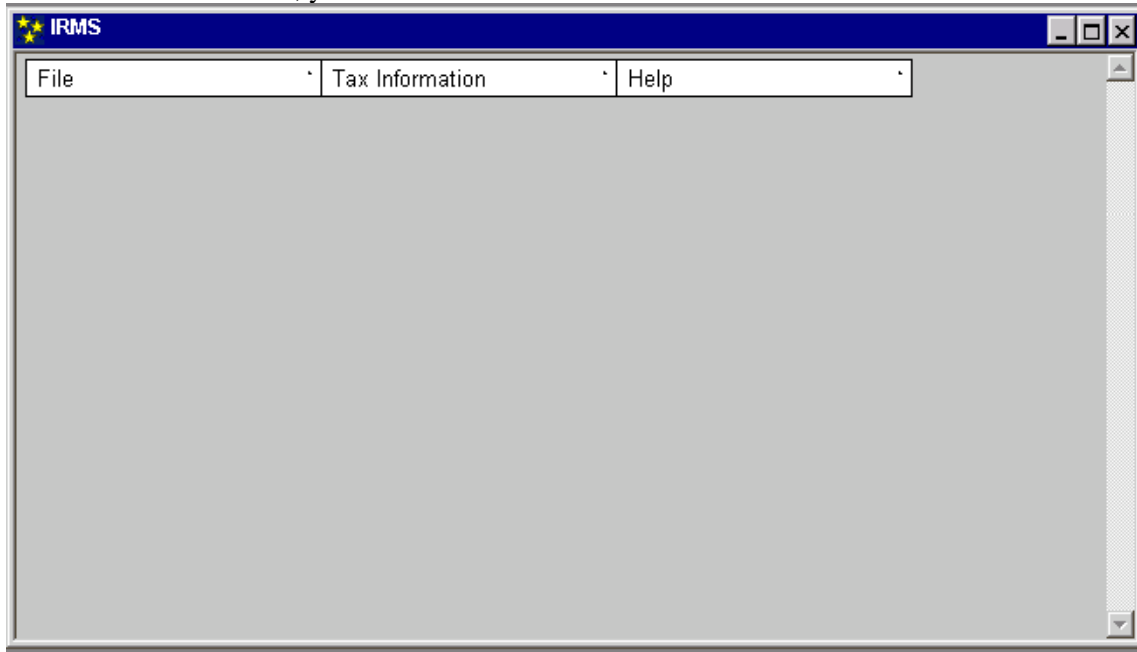
Step 1: From the **File** menu, select the **Exit** option. You receive a system prompt pop-up window asking you to confirm the exit.
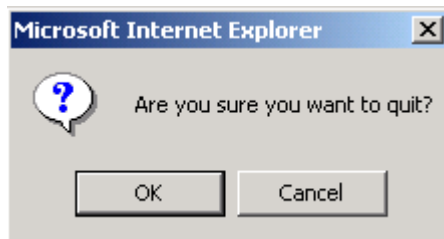
Step 2: Click **OK** to exit IRMS and return to your desktop window, OR

Click **Cancel** to return to IRMS if you do not want to exit.